QRG - Business Rule List

> ⓘ **Purpose:** This is a complete list of all business rules used in OR PTC DCI.
>
> **Outcome:** Staff understand what business rules are and which ones are in use in OR PTC DCI.

Staff- Business Rule List QRG v2.1.pdf

Business rules are system directions that define business activities. Business rules are lists of statements that tell the system whether you may or may not do something in the system. The following business rules have been enabled for OR PTC DCI. Business rules are set as either a hard or soft stop.

- A hard stop means the system will not allow the entry to save.
- A soft stop means the entry will save but will be flagged as Pending and will remain in the Pending Entries tab until action is taken by either a staff member or the provider.

Business Rule Name	Description	Soft /Hard Stop	Real-Time Entries	Historical Entries
Authorization Remaining Balance (Hourly)	Alerts that the punch exceeds the authorization remaining balance	Hard	Yes	Yes
Authorization Remaining Balance (Mileage)	Restricts adding a punch that exceeds the current available balance on the authorization	Hard	Yes	Yes
Timely Filing Employees Punch Entry	Restricts how many days after the date of service a punch can be entered (the number of days is determined by the CBA)	Hard	No	Yes
Client Discharge Punch Entry Business Rule	Restricts adding a punch for a date of service beyond the client's discharge date	Hard	Yes	Yes
Employee Service Account Start Date Punch Entry	Restricts adding a punch for a date prior to the start date of the employee service account	Hard	Yes	Yes
Employee Service Account End Date Punch Entry	Restricts adding a punch for a date beyond the end date of the employee service account	Hard	Yes	Yes
Employee Termination Date Punch Entry	Restricts when adding a punch for a date beyond the employee termination date	Hard	No	Yes
Duplicate/ Overlapping Employee Punch	Restricts adding a punch that duplicates/overlaps an existing punch for the same employee the service code specified in the parameters	Hard	No	Yes

Related articles

- Guide - OR PTC User Settings Guide
- Staff Learning Materials Catalog
- Guide - Time Entry Management
- Online Learning - Recovering a Forgotten Password
- Business Process - Managing Staff Profiles